

TO: Board of Education
FROM: The PUSD Facilities Steering Committee
DATE: May 20, 2016
RE: Recommendation To Seek Voter Approval of a \$65 Million Bond Measure

Starting in January 2016, Piedmont Unified's Facilities Steering Committee has been meeting regularly to review the District's educational goals and Facilities Master Plan, consider various concept designs and preliminary budgets, and develop recommendations concerning implementation of this Plan. The Committee now unanimously recommends that the Board of Education seek voter approval of \$65 million in bonds at the November 2016 general election, to allow the District to address some of the most critical educational objectives and building deficiencies identified in the Facilities Master Plan.

The scope of and rationale for the Committee's recommendations are discussed below. Members of the Facilities Steering Committee will attend the Board of Education meeting on May 25 and can answer any questions you may have about these recommendations.

Summary

The Steering Committee believes that, to continue to provide an excellent education for Piedmont children, the District should begin to address the significant needs identified in the Facilities Master Plan. The District cannot complete all of the work identified in the Plan at one time because the estimated cost exceeds the District's current bonding capacity. The District will have to prioritize the work and seek voter approval to make these improvements in phases. In addition to cost constraints, other constraints on implementation include challenging site topography and limited real estate for the middle and high schools. The Committee believes that the Piedmont High School campus should be the primary focus because the PHS buildings are the oldest in the District with the most severe physical needs, because PHS serves all Piedmont students in their highest level of education in the District, and because supporting high school STEAM education (Science, Technology, Engineering, Art, and Mathematics) is a paramount educational goal.

In addition to PHS, the Committee recommends investment in new classrooms at the elementary schools to support extended-day kindergarten. To make these recommendations, the Committee studied a range of conceptual designs and preliminary cost estimates to assess how the most pressing educational goals may be accomplished while obtaining the greatest value for the money. It is important to note that the Committee is not recommending a specific design concept. If the bond is approved by voters, more public input would be needed to determine the scope and sequence of projects, assess the educational benefits and trade-offs of the various options, identify additional options, and determine the best solutions. It is also important to note that the Committee considered and does *not* recommend simply repairing or replacing failing equipment in the existing buildings, as that would not address the educational needs and merely defer necessary new construction.

Background: Development of the Facilities Master Plan

In 2015 and 2016, Piedmont Unified assessed whether its facilities support changing educational programs and goals. Educational programs and objectives must keep pace with the changing needs of the world outside the classroom. Readiness for higher education and future careers requires different types of knowledge, different educational experiences, and a different set of skills than in the past. To serve the needs of students, it is essential to offer students a broad range of educational opportunities. For example, students must have the opportunity to: learn through project-based exploration, collaboration, and presentation; investigate the connections among the sciences, and develop and test hypotheses; work individually, in small groups, and in large groups; complete service projects; and take full advantage of modern educational technologies. This comprehensive assessment, called “facilities master planning,” is intended to address current and future educational needs of students and ensure that facilities provide both the functionality and capacity to support educational excellence.

- ***Assessment of Whether Facilities Support Educational Goals***

During the fall of 2015, nearly 30 District educators and administrators met four times to discuss the educational programs and goals, and the educational appropriateness of the existing facilities.¹ The group discussed: current and future educational needs of students; classroom functionality and capacity; whether the school sites provide an environment that is appropriate, comfortable and conducive to learning, including classroom size, acoustics, air quality, ventilation, and climate control; student safety and security; and current and future facilities use by the broader Piedmont community. The group consulted with the Piedmont Police Department, Piedmont Recreation Department, and school security professionals. This work culminated in development of [Educational Specifications](#) to identify the facilities needed to support the District's educational programs.

- ***Assessment of Physical Condition of Facilities***

During the same time period, a team of architects and engineers assessed the condition of each school facility including: educational appropriateness; mechanical and plumbing systems; safety and security; energy efficiency; and fire/life/safety and accessibility code compliance. This team consulted with the Piedmont Police Department, Recreation Department, Department of Public Works, and school security professionals concerning site security and community use. The team also developed a “solar master plan” with the Bay Area Air Quality Management District to generate enough solar power to offset all of Piedmont Unified's energy use. This work culminated in development of a

¹ This team included: Randall Booker, Superintendent; Song Chin-Bendib, Assistant Superintendent - Business Services; Pete Palmer, Director of Maintenance, Operations & Facilities; Dr. Cheryl Wozniak, Director of Curriculum & Instruction; Stephanie Griffin, Director of Instructional Technology; Michael Brady, Director of Alternative & Adult Education; Julie Valdez, Director of Special Education; Brent Daniels, Principal of PHS; Ken Taylor, Elementary Admin Rep; Sati Shah, Principal of MHS; Ryan Fletcher, Principal of PMS; Courtney Goen, Virginia Leskowksi, Marna Chamberlain, PHS Teacher Reps; Ken Brown, MHS Teacher Rep; Amy Savage, Carolyn White, Logan Medina, PMS Teacher Reps; Ras Medura, PUSD Custodian; Mike Wong, PMS Classified Rep; Lydia Adams, Kelly Wallis, Havens Teacher Reps; Lianne Morrison, Kathleen Schneider, Wildwood Teacher Reps; Anne Valva, Raul Jorcino, Beach Teacher Reps.

Facilities Assessment ([Part 1](#) and [Part 2](#)) concerning how the existing facilities meet our educational needs and goals.

The [Facilities Master Plan](#), adopted in 2016, combines (1) the assessment of the educational appropriateness of facilities with (2) the assessment of the physical condition of facilities and (3) teacher and community input, and identifies a range of improvements needed to support our educational programs now and in the future. (For more information about the Plan, see these [Answers to Frequently Asked Questions](#).)

Cost Constraints: The Cost of Implementing the Plan Far Exceeds the Available Funding

As documented in the Facilities Master Plan, educational needs have changed since the District's middle and high schools were constructed, and both additional and different kinds of facilities are needed to support educational excellence, particularly in STEAM. Also, the middle and high schools have aging mechanical, electrical, and plumbing systems that have reached the end of their useful lives. These systems are highly inefficient, wasteful, expensive to operate, and require either overhaul or replacement. The elementary schools, recently replaced or remodeled as part of the District's seismic program, are in excellent physical condition. Nonetheless, educational needs at the elementary schools include additional classrooms for extended-day kindergarten, cooler classrooms, and greater campus security.

The District cannot complete all of the work identified in the Plan at one time, because the estimated cost is roughly \$130 million, far in excess of the current bonding capacity. KNN Public Finance, Piedmont Unified's financing consultant, recently advised the District that it can issue up to \$65 million in bonds. (For more information about Piedmont Unified's "bonding capacity," please refer to the [Facilities Master Plan FAQ](#).) The District will have to prioritize the work and seek voter approval to make these improvements in phases

Additional Constraints on Implementation

As noted above, the Facilities Master Plan articulates a range of compelling needs and educational goals, but the cost of full implementation exceeds the District's current bonding capacity. Additional constraints that limit design and implementation options include:

- ❑ The size and topography of the middle and high school site is challenging -- it is small, sloped on a hillside, and there is little available space to expand.
- ❑ State regulation of school facilities can add enormous expense to even modest projects, and can be unpredictable. In many cases, it is only after a project has been fully designed that the State will determine whether to add to the project scope. For example, it is unclear whether modest changes to PMS classrooms would trigger a requirement to add or remodel restrooms to comply with accessibility codes. This requirement alone could leave the District without funds to address other educational needs.
- ❑ During construction, the District hopes to avoid relocation of students to a temporary school site for several reasons. Relocation adds considerable

expense to construction projects and can be disruptive for students and staff. Also, there are few, if any, appropriate relocation options within or close to Piedmont. The District would try to avoid relocation through careful sequencing of the implementation plan.

- ❑ Some of the high school buildings are over 40 years old. Because of their age and condition, renovation of these buildings necessarily means a complete overhaul of both systems and structures. Also, the footprint of these existing structures, which have poor campus flow, limits design options.

The Role of the Steering Committee

The District's Facilities Steering Committee plays a significant role in bringing community viewpoints and professional expertise into the management and oversight of the District's capital projects. The District relied on the Committee to oversee both the Seismic Safety Bond Program and the Modernization Program, and both programs were completed on time and on budget. Members of the Committee helped guide these programs to successful completion.

The Committee, which has changed in composition over time, now consists of: Grier Graff; Brad Hebert; Robert Hendrickson; John Gibbs; Sally Aldridge; Angel Fierro; and Bernard Pech. District staff who serve on the Committee include: Superintendent Randall Booker; Assistant Superintendent Song Chin-Bendib; Director of Facilities Pete Palmer; and Board of Education Members Rick Raushenbush and Doug Ireland. This group represents a diversity of viewpoints about how best to implement the Facilities Master Plan.

Starting in January 2016, the Steering Committee's mandate has been to: study the Facilities Master Plan; help develop various options to prioritize and phase the work in anticipation of one or more facilities bond measures; scrutinize detailed cost estimates developed by District staff in conjunction with general contractors specializing in school construction; and develop recommendations for the Board of Education. The Committee was guided by considerations of how to accomplish the most pressing educational goals and how to get the best value for the investment of bond funds.

- ***Review of Conceptual Designs***

Quattrocchi Kwok Architects (QKA), the architects who helped develop the Facilities Master Plan, created several [conceptual proposals](#) for purposes of illustration and discussion. These concept designs attempt to address *all* of the needs articulated in the Plan and, as mentioned above, are estimated to cost roughly \$130 million.

The Steering Committee considered the QKA conceptual designs as well as multiple, wide-ranging options to address some of the most pressing needs *within the District's current bonding capacity*. Specifically, the Committee studied concept plans including: construction of a new 2-story or 3-story STEAM building on Magnolia Avenue; construction of a new 2-story or 3-story STEAM building on the Binks' Gymnasium Parking Lot; renovation of the existing PHS buildings, and construction of a new PHS building with a floor dedicated to STEAM; renovation of the existing main PMS building, and a new PMS building. The Committee also considered building a new, larger Alan Harvey Theater. The Committee assessed the likely costs, educational benefits, and

trade-offs of each option. Actual costs will be dependent on the competitive bidding process based on future construction drawings and additional ideas from members of the community.

Please note that the Committee does not recommend a specific design because, if voters approve the bond measure, more public input would be sought and further iterations of potential designs would be developed. The Committee expects that further public input may identify other ways of meeting the District's educational needs, and looks forward to that public engagement process.

- ***Review of Cost Estimates***

The District's Director of Facilities has worked closely with general contractors who specialize in school construction to develop preliminary pricing for each of the concept designs. Based on these estimates, the Steering Committee determined that a \$65 million bond would enable the District to make significant progress toward its most pressing educational goals (concerning STEAM education and extended-day kindergarten) as well as addressing pressing facility needs at PHS. The Steering Committee also determined that seeking a smaller bond would not be sufficient to advance these most critical educational goals, and would merely defer construction that will become even more expensive over time.

Steering Committee Recommendations

Overall, the Committee agrees with the goals set forth in the Educational Specifications, accepts the evaluation of the District's current facilities in the Facilities Assessment, and believes that, to continue to provide an excellent education to Piedmont children, the District should begin to address the identified educational needs to the extent financially feasible. The Committee's recommendations follow.

- ***The Board of Education should seek voter approval to issue school bonds at its available bonding capacity -- roughly \$65 million -- to address the educational needs identified in the Facilities Master Plan.***

The District must begin to address the educational needs identified in the Facilities Master Plan to maintain and improve the District's educational programs. As noted above, the Committee reviewed several options, each with its own benefits and trade-offs. None met *all* of the District's educational needs at an estimated cost of \$65 million or less, but the Committee determined that substantial, necessary improvements can be made within this amount.

The Committee also determined that seeking a smaller bond would not be sufficient to advance the most critical educational goals concerning STEAM education and extended-day kindergarten, and would merely defer construction that will become even more expensive over time.

The Committee has a diversity of viewpoints, and there were differences of opinion about how to get the most value for the money available. Nonetheless, there was unanimous agreement that the District should seek approval to issue the full \$65 million in school bonds to begin the necessary work. The Committee believes that, following

voter approval, public engagement about the design options will lead to the best design solutions.

- ***The Board of Education should not seek to “do the minimum” by only repairing or replacing failing systems at the middle and high schools.***

The Steering Committee considered the option of doing only what is minimally required to repair or replace nonfunctioning building systems at the middle and high schools. Although carefully considered, this option was rejected *because it would not advance the District’s educational goals*. For example, it would not modernize science labs or add needed classrooms. More to the point, this minimal approach would invest nearly \$14 million in buildings that will eventually need to be replaced or significantly renovated to meet 21st Century educational goals. The Committee determined that it would not be a good value to invest in a building if the building is nearing the end of its useful life and the improvements will not extend its useful life.

- ***Recognizing that it is not possible to address all of the needs identified in the Facilities Master Plan within the current bonding capacity, the Board of Education should prioritize the work in roughly the following order.***

The following is a *rough* prioritization because smaller, less costly projects may be combined with larger projects in a way that achieves the most value even if not in the direct order of priority.

1. **Modernization of Piedmont High School, including creating state-of-the-art STEAM facilities, upgrading antiquated building systems, increasing energy efficiency, and improving teaching and learning spaces.**

The Committee believes that the PHS campus should be the primary focus for a number of reasons. Specifically, PHS serves all Piedmont students in their highest level of education in the District, and its buildings are the oldest in the District with the most severe physical needs.

The Committee believes that educational excellence requires a significant upgrade in the PHS STEAM facilities, including larger and better equipped science labs, engineering (“Makers”) space, and facilitating cross-disciplinary projects by bringing together (to the extent practicable) science, computer science, engineering and art activities. Student learning also requires collaboration and presentation space.

2. **Addition of Piedmont Middle School classrooms, and improvement of existing PMS classrooms to provide more learning space and reduce noise transfers among classrooms, to the extent practicable given requirements imposed by the State.**

The Committee recognizes that PMS needs additional, larger, and better-equipped classrooms. The critical issue here is whether some deficiencies in the existing “library wing” classrooms can be addressed without the Division of State Architect (DSA) requiring a major structural overhaul to address ADA (accessibility) issues, particularly for bathrooms. A major PMS overhaul to

address such ADA issues likely would leave the District without funds to address other educational needs.

The master plan identified the opportunity to add STEAM facilities to PHS which would free up classrooms in the 760 Magnolia Avenue building, also known as “the 40s building,” for PMS use (above the District’s main office).

3. Improvements at each elementary school to support extended-day kindergarten and address classroom climate issues.

The Committee also recommends that a portion of the funds be used for improvements to support extended-day kindergarten at each elementary school. The District is one of the few school districts in California that does not already offer extended-day kindergarten. To do so, additional classrooms are needed.

4. Other issues addressed in the Facilities Master Plan.

These other issues include creation of specialized facilities to sustain, improve and expand course offerings, creation of private meeting space for Wellness Center programs, and improvement of athletic facilities.

- ***The Board of Education should propose this bond measure for the November 2016 election.***

The Steering Committee recommends that the Board of Education place the measure on the November 2016 ballot. If not in November 2016, under California election laws, the District would have to wait until November 2018 to submit the proposed facilities bond measure to voters. Given that any plan would take approximately two years following voter approval to begin construction, and then likely one or two more years to complete construction depending on the scope of work, the Committee believes it is imperative to move forward now to address these critical needs.

Community Engagement

The Steering Committee recommends that the District move forward with a bond measure, although it is not recommending a specific design. If voters approve the measure, there would be a comprehensive design process incorporating community input. This approach would mirror the Seismic Safety Bond Program, which moved forward without specific architectural designs or even conceptual plans. Only after voter approval did the design process begin, and ideas for the new (rather than retrofitted) Havens emerge. The community played a vital role in developing the plans for the new Havens building, and the same would be true for any modernization of the middle and high schools. In addition to the design, there would be community engagement concerning bond program priorities, allocation of bond funds, and staging of construction, among other issues.